

## Northwest

Tijuana  
**Mexicali**  
 Hermosillo  
 Nogales  
 Ensenada  
 Tecate  
 Rosarito

## Northcentral

Ciudad Juarez  
 Chihuahua  
 Durango

## Northeast

Monterrey  
 Saltillo  
 Torreon  
 Reynosa  
 Matamoros  
 Nuevo Laredo

## Bajío

Guanajuato  
 Queretaro  
 Guadalajara  
 San Luis Potosi  
 Aguascalientes  
 Lagos de Moreno

## Central

Mexico City  
 Toluca  
 Puebla



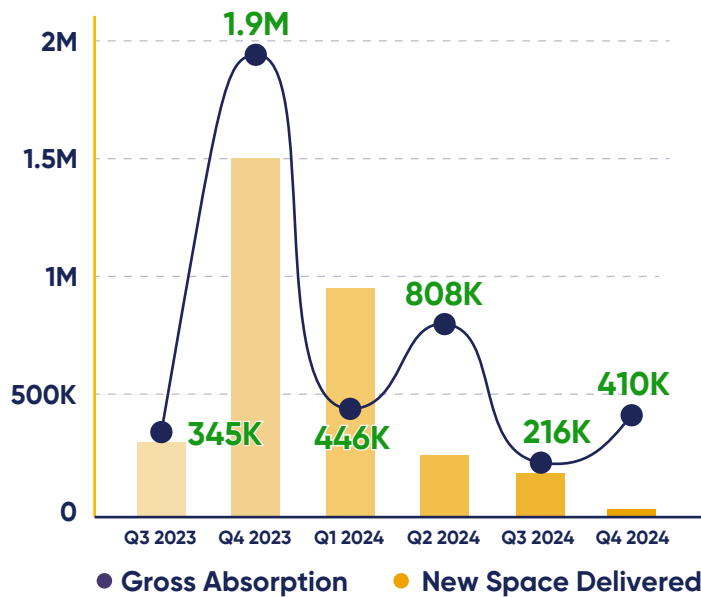
### METRO AREA OVERVIEW

As the capital of Baja California, Mexicali is the state's second largest city, home to more than 1 Million people. Mexicali also comprises part of the Cali-Baja Megaregion, contributing water, solar and geothermal energy, as well as two ports of entry into California. Mexicali is located south of El Centro and Calexico, California, and provides optimal connections to California, Arizona, Baja California and Sonora. The city has 19 universities, of which many offer degrees paired with foreign operations.

### INDUSTRIAL MARKET OVERVIEW

Mexicali's ability to transport finished goods for "overnight" delivery to the Western US is driven by more than 40 industrial parks and zones. The top 3 industrial sectors in the city are aerospace, medical devices and electronics, and the largest employers are BIMBO, Coca-Cola, and JUMEX. Land available for future industrial development exists on the west, east, and south sides of the city. Additionally, Mexicali's flat topography is ideal for the construction of industrial parks and buildings.

### HISTORIC DEMAND AND NEW SPACE DELIVERED (SF)



### MARKET ACTIVITY

**Gross Absorption:** A total of 410K SF was absorbed, consisting of existing space occupied.

**Availability:** Increased to 2.6M SF, due mostly to:

- 34K SF of available space delivered.
- 564K SF of vacated space.

### MARKET LEVERAGE



Given that vacancy and availability are high, leverage leans more towards tenants.

### MAIN INDICATORS LEVEL 1 (SF) ▲▼ Previous Quarter Difference

|             | MARKET SIZE | AVAILABILITY | VACANCY | GROSS ABSORPTION | NET ABSORPTION | AVG. LEASE RATE<br>(US\$/Mo) |
|-------------|-------------|--------------|---------|------------------|----------------|------------------------------|
| CURRENT QTR | 39M         | 2.6M         | 6.62%   | 409.8K           |                |                              |
| PAST QTR    | 38.9M       | 2.4M         | 6.09%   | 216.4K           |                |                              |
| CHANGE      | ▲34.6K      | ▲208.9K      | ▲0.53%  | ▲193.4K          |                |                              |

**CONTACT US FOR  
LEVEL 2 REPORT**

**WHERE CAN WE HELP YOU NEXT?**

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All measurements are in square feet | Market Size, Vacancy and Availability are based on existing buildings, excluding under construction | No warranty or representation, express or implied, is made as to the accuracy of the information.





## LEVEL 1 GLOSSARY

### Market Size

The combined size, stated in square feet, of all the industrial buildings, distribution centers and warehouses that physically exist in the market for this quarter.

### Availability

The combined size, stated in square feet, of all the industrial buildings, distribution centers and warehouses that physically exist and are currently available in the market for this quarter.

### Vacancy

The percentage of all existing space currently available in relation to the total size of the market.

### Gross Absorption

All physically existing space that was newly occupied by a tenant or buyer during the quarter; the sum of existing space leased (or acquired) and buildings that finished construction and are newly occupied by a tenant upon delivery (BTS and pre-leased Spec.).

### Net Absorption

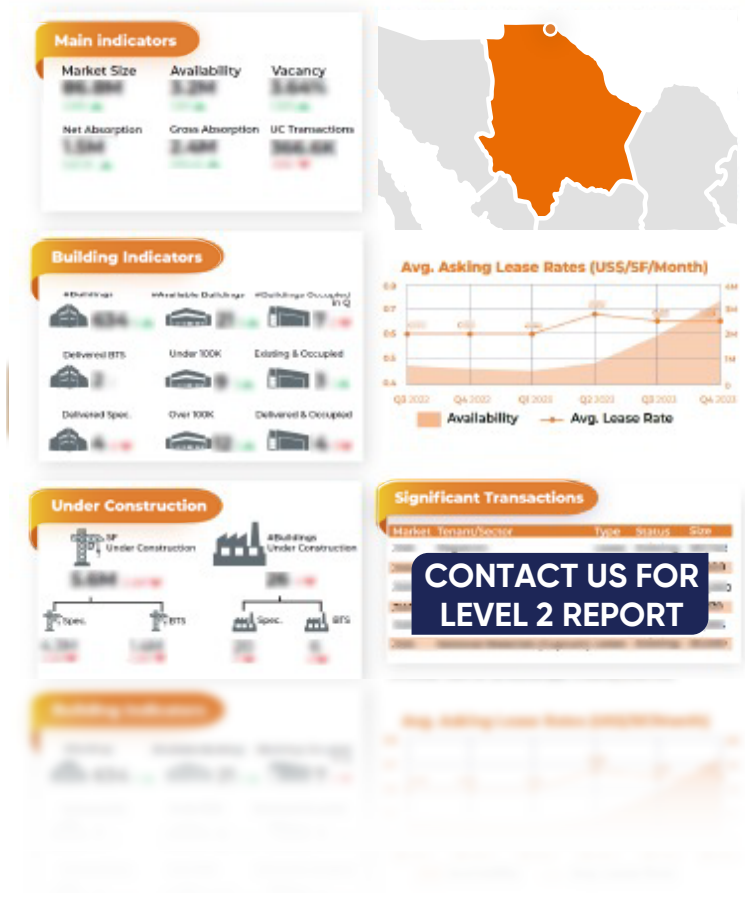
The resulting subtraction of all physically existing space newly occupied during the quarter minus the space that has become available during the period; Gross Absorption minus Vacated space and Delivered & Available Spec.

### Avg. Lease Rate

The monthly lease rate per square foot that, on average, the owners of all available buildings are requesting.

## Need access to more industrial analytics?

### • Access to Level 2 "decision-making" KPI'S



### Access Levels & Benefits

| KPIs                             | LEVEL 1<br>MEXICO REAL<br>ESTATE ANALYTICS | LEVEL 2<br>ADVANCED MEXICO<br>BUSINESS INTELLIGENCE | LEVEL 3<br>STRATEGIC<br>PLANNING SUITE |
|----------------------------------|--------------------------------------------|-----------------------------------------------------|----------------------------------------|
| Number of KPIs available         | 6                                          | 25                                                  | 52+                                    |
| Gross Absorption                 | ✓                                          | ✓                                                   | ✓                                      |
| Vacancy                          | ✓                                          | ✓                                                   | ✓                                      |
| Market Size                      | ✓                                          | ✓                                                   | ✓                                      |
| Available SF                     | ✓                                          | ✓                                                   | ✓                                      |
| Available Buildings per size     | ✓                                          | ✓                                                   | ✓                                      |
| *Upon request                    |                                            |                                                     |                                        |
| Markets summaries                |                                            |                                                     |                                        |
| Basic market description         | ✓                                          | ✓                                                   | ✓                                      |
| In-depth analysis                | ✓                                          | ✓                                                   | ✓                                      |
| Interactive dashboard            |                                            |                                                     |                                        |
| Basic                            | ✓                                          | ✓                                                   | ✓                                      |
| All markets                      | ✓                                          | ✓                                                   | ✓                                      |
| Regional and national            | ✓                                          | ✓                                                   | ✓                                      |
| Multi-market comparison          | ✓                                          | ✓                                                   | ✓                                      |
| Market analysis                  |                                            |                                                     |                                        |
| Single market                    | ✓                                          | ✓                                                   | ✓                                      |
| Multi-market analysis            | ✓                                          | ✓                                                   | ✓                                      |
| Developer/Owner tools            |                                            |                                                     |                                        |
| Building competitive position    | ✓                                          | ✓                                                   | ✓                                      |
| Future tenant/origin expectation | ✓                                          | ✓                                                   | ✓                                      |
| Location analysis                | ✓                                          | ✓                                                   | ✓                                      |
| Building requirement analysis    | ✓                                          | ✓                                                   | ✓                                      |
| Strategic Planning Report        | ✓                                          | ✓                                                   | ✓                                      |
| NAI Mexico support services      |                                            |                                                     |                                        |
| Local broker project Support     | ✓                                          | ✓                                                   | ✓                                      |
| Management consulting            | ✓                                          | ✓                                                   | ✓                                      |

# WHERE CAN WE HELP YOU NEXT?

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## NEED ACCESS TO MORE INDUSTRIAL ANALYTICS

- NEED TAILOR MADE ANALYTICS FOR YOUR PROJECT? **REQUEST LEVEL 3 ACCESS**



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